

July 18, 2003

Federal Communications Commission
445 Twelfth Street South
Washington D.C.
20054

To Whom It May Concern:

My name is Michael Turner and I am President and Senior Scholar of the Information Policy Institute. The Institute is a non-profit, non-partisan research organization based in New York City--and is the only institution of its kind dedicated exclusively to issues involving the regulation of information, both domestically and globally.

Since its inception the Institute has devoted a tremendous amount of its intellectual capital to the study of anti-trust issues related to media concentration. We believe there is ample evidence to conclude that the U.S. Hispanic market is a distinct market.

There is a great deal of evidentiary material to suggest that Hispanic media comprises a distinct product market both for viewers and advertisers. Certainly for those Hispanic-Americans who do not speak English, Spanish-language programming is their only option. There is absolutely no substitutability between Spanish-language and English-language programming for this group of consumers. Likewise, advertisers seeking to reach this group of consumers have no recourse but Spanish-language media, clearly substantiated by the separate allocation of advertising dollars invested specifically to produce and disseminate product promotion to this market.

Indeed, since 1992 Nielsen has provided comprehensive measurement services for Hispanic television viewing and Spanish-language television in the U.S. the fact that Hispanics represent a distinct consumer base, with tastes that differ from the broader population is unmistakable. Likewise from the viewer's perspective, evidence suggests limited substitutability of programming for Hispanic audiences. According to a recent study by the Tomas Rivera Policy Institute bilingual TV viewers also were more likely to watch television news in Spanish--about 57 percent said they preferred to watch Spanish-language news.

While rigorous empirical analysis would be necessary to substantiate the claim that Hispanic media constitutes a distinct product market, even a cursory glance at the facts makes it plain that this is very likely the case.

I hope you find this useful in the Commission's consideration of the U.S. Hispanic media market as a separate relevant market and its review of the Univision/HBS merger.

Respectfully yours,



Michael A. Turner, Ph.D.